# Participatory Grantmaking Report Back

Community Involvement & Radical Hospitality

THE
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"If families commit to their own learning and growth, participatory grantmaking can offer an expansive way to deepen their family legacy through the values alignment of granting out dollars with a community-centric, equitable process."

— The Share Fund's Story of Incorporating Participatory Grantmaking in Family Philanthropy

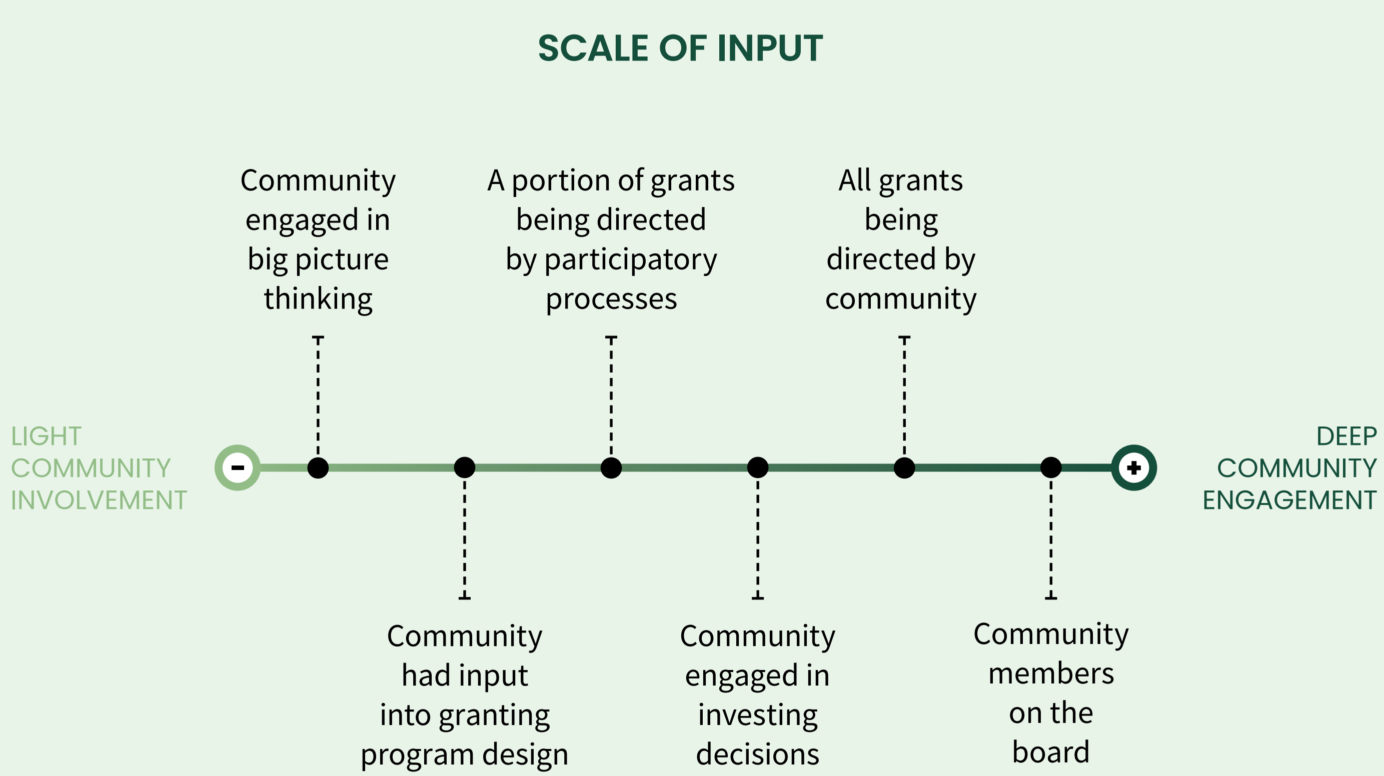
## What is participatory grantmaking?

Participatory grantmaking engages non-board/family members in providing input at some level into the allocation of capital. Typically, the community members are drawn from the communities that are being supported by the foundation.

Bringing people into the work of philanthropy offers an opportunity in how a foundation does their work to deepen community connections. As a result, further trust and increased transparency, as well as deeper learning can all happen in the foundation's relationship to the community it serves, but also among those community members. Ultimately the deepening of relationships can amplify the positive impacts of the foundation.

## Scale of community engagement

Engaging individuals from outside the family in the work can happen in a range of ways. On a smaller scale, this can look like seeking community input into the shape of granting programs, with that input guiding everything from how calls for applications are executed, to influencing the impact areas that granting focuses on. At a deeper level of community participation, members can participate in actual granting decisions, fund allocation or even join the family on the board.






## What we heard

While the scale of participatory grantmaking varied throughout our research, the following themes emerged as important considerations to guide successful engagements with the community:

- **Radical hospitality:** Prioritize relationship building that enriches the experience of those who participate. Welcome people in a way that asks little of them, but encourages connection, is authentic, enriching and often exceeds their expectations.
- **Transparency:** Be sure to clarify everyone's roles and the scope of what you are asking for throughout the process.
- **Specificity:** Be very clear with community members about what your limits are in terms of where their feedback and input will be put to use.
- **Flexibility:** Be intentional, listen and shift as needed.
- **Slow down:** Prioritize relationship building over speed whenever possible.
- **Compensation:** Be sure to resource the work properly by compensating community participants.
- **Close the loop:** It is vital to report back to those who have participated about how their involvement had an impact.
- **Staff resources:** Succeeding in all of the above areas will require adequate staff time and budget. Do not try to do this work off the side of anyone's desk.

## Who else has done this?

Participatory grantmaking has long been a part of community foundations as a key element of their accountability to the stakeholders and communities that they serve. Increasingly, it is a model being adopted by other foundations, including family led foundations. Interest in participatory grantmaking often comes from:

- Maturing of foundations looking to deepen impact and community connections.
- Has been accelerated by events of 2020 and ongoing equity conversations in changemaking communities.
- As an aspect of trust based philanthropy practices.

As a part of our research, a number of articles and case studies were reviewed and have been included as an appendix. We also spoke to staff involved in participatory grantmaking from the following foundations:

- McConnell Foundation
- Equality Fund
- Canadian Women's Foundation
- The Durfee Foundation
- The Stupski Foundation
- The Haas Family Foundation
- Katy Love (a participatory grantmaking advisor)



## Who would be involved from the community?

- Everyone we spoke to suggested beginning by looking to the foundation's existing network. Overtime, you may wish to add people who are not already a part of your existing network, but begin with relationships you already have.
- When choosing people, look to those who are already highly responsive as they are more likely to be engaged participants.
- At the same time, broaden your idea of who a traditional "leader" may be, as those leaders may already be overcommitted and may dominate in group dynamics. The Share Fund report suggests looking for people who are "flexible, group-driven, had a clear vision of justice, and were able to sit with the discomfort and ambiguity of an unknown process" in other words look for those who are both trusting and trustworthy and believe in a shared vision of growth for all.
- When expanding beyond the existing circle, consider if there are organizations or partners one degree out who could be asked to nominate or suggest additional participants, these could be other organizations that are working with larger communities.
- Balance the need to include a diversity of perspectives with recognizing the benefits of a smaller group. In a practical sense a smaller group is easier to schedule and will be easier to build relationships within. The more people that are around the table the more likelihood of overlapping conflicts of interest there may be.
- Be sure to acknowledge conflicts of interest and make a plan for how you will accommodate and navigate them.

## How might the board's impact shift?

- Over time, the culture on the board may reorient toward more listening to the needs of the community.
- Community members could help make decisions about strategy for the foundation.
- One day the board may no longer be making some or all decisions about granting.

Through building further capacity within the sector, the foundation may see a higher scale and more lasting impact.

## How do we do this well?

- **Thoughtfully & iteratively:** Allow for changes that can build on successes and learnings along the way
- **Well resourced:** Ensure staff resources can be shifted to focus here or bolstered to support the work and of course compensate participants
- **Reflect:** Check-in internally and report back externally



## Where to start?

### **Stage 1:** Community building & listening

- Plan for a series of events over the course of one year where the Foundation can relate to the community in ways that step outside of the granting relationship.
- Some events should have a more formal purpose or program, such as attending an event or a workshop hosted by the foundation, while others should be more unstructured and offer community members a chance to connect and for the foundation to listen.
- Apply the principles outlined above to seek feedback and listen to what participants identify as ways the foundation can deepen their engagement going forward, while being in dialogue with participants about their experience.

### Proposed Events:

- 3-4 workshops for grantees on specific topic areas, (first come/first served registration)
- Sponsor a table at events like WestCoast LEAF Equality Breakfast and similar community wide events
- 3-4 times a year host lunch or breakfast meetings with no formal agenda but with guiding questions/ice breakers to encourage connection. Include grantees (potentially from across grant streams) so they can connect and strengthen relationships.
- Holiday party for a larger community of people connected to the foundation.

### **Stage 2:** Design participatory process

- Following the year (approx) of deeper community engagement outlined above, invite community members to participate in the work of the foundation in some way. This may be to advise on granting focus areas within a fund, or shifting how the application process works, or perhaps feedback on how reporting to the foundation happens. It's possible that Stage 1 will uncover other ideas yet to be defined.
- Participation from the community may happen only within one granting stream or across granting streams. It may also only include a portion of the funds being allocated.
- At this stage, participants should be compensated for their time and input, through research we have seen everything from $1,500 up to $5,400 to participate in a process to support one round of granting.

### **Stage 3:** Active community participation

What this looks like will be designed in Stage 2 as described above.

**Note:** each stage should involve time for feedback/conversation among those involved from the community, as well as with the board and staff, to learn how it's going and what may benefit from some adjustments.



## Resources

### Reports & Toolkits

- The Share Fund Report

  Letting Go of Power, Centering Community: The Share Fund's Story of Incorporating Participatory Grantmaking in Family Philanthropy
- Fund for Shared Insight

  Participatory Philanthropy Toolkit
- Conant Fund

  What We Do: Shifting Power: Includes documents that outline the workplan, timelines, decision making process, conflict of interest policies etc.
- Candid Learning

  Deciding Together Shifting Power and Resources Through Participatory Grantmaking Toolkit
- Tzedek Social Justice Fund

  The Journey To Collective Liberation: Series of webinars and mini-reports on their process of engaging community in the foundation.

### Articles

- 5 Key Findings on Participatory Grantmaking
- A Primer for Participatory Grantmaking
- Participatory Grantmaking What Practitioners Have to Say
- Getting Your Board on Board with Participatory Grantmaking

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